

## MIXER SYSTEM – ONLINE USERS GUIDE

# ACKNOWLEDGMENTS

A special thank you is extended to all those who dedicated their time and efforts in making this project a success. Below is a list of the KRC and Governor's Office of Technology (GOT) personnel involved.

## **KRC MIXER team members:**

Bill Canon (Project Manager)  
Deborah Barnes  
Carolyn Blankenship  
Larry Brown  
Jennifer Cheek  
Lisa Foley  
Ron Gordon  
Ed Penn  
Robert Pillow  
Linda Sheets  
Shirley Stump  
Carmen Wills  
Ferlin Wright

## **GOT MIXER team members:**

Mike Jull  
Susan Byers  
Gargi Chatterjee  
Sandeep Kapoor  
David Mahoney  
Susan Quarles

## **Other KRC Contributors:**

Debbie Dunn  
Ben Hardy  
James Koontz  
Donna Manning and staff  
George Ralston  
Joyce Richardson  
Kathy Riley  
Carlos Sams  
Jim Shelby  
Bonnie Walton  
Jim Wash  
Karen Wise

# MIXER SYSTEM – ONLINE USERS GUIDE

## TABLE OF CONTENTS

INTRODUCTION .....	4
SCREEN DESIGN .....	4
LOGON SCREEN .....	6
ACCOUNT INQUIRY SCREEN .....	8
TRANSACTION INQUIRY/SEARCH SCREEN .....	11
ACCOUNT SEARCH SCREEN .....	17
ADD ACCOUNT SCREENS .....	21
MAINTENANCE SCREEN .....	30
NAME MAINTENANCE SCREEN .....	34
ADDRESS MAINTENANCE .....	37
WORK LIST SCREEN .....	41
COMMENT ADD SCREEN .....	48
COMMENT INQUIRY/SEARCH .....	51

## Introduction

MIXERS is a web-based application that displays and maintains Revenue Cabinet information for the Miscellaneous Taxes. This system replaces the Miscellaneous Tax System (MTX) implemented in the 1980's and provides much more functionality and capability. This system is intended to improve the quality of data stored for the non-major taxes and provide a registration system to enable a more effective transition to the future Kentucky Integrated Tax System Master Taxpayer Index (MTI).

## Screen Design

### *Designing Principles*

#### Efficient Navigation

Providing a good efficient navigation is very important in designing applications. The following principles were considered while designing the navigation:

1. The user can navigate to any screen from any screen with maximum of 3 clicks. This was achieved by having a top level navigation bar on the top of most screens and fewer links.
2. Visual cues are provided to indicate the screen users are on so that users can orient themselves within the navigational framework:
  - On the IE(the browser) caption there is a short description of the current screen.
  - The color of the current screen on the Navigation bar is light blue.

#### Manageable Page sizes

The screens were designed for 800X600 resolution. The page sizes were kept at a minimum in order to improve performance and user satisfaction. On search screens where the amount of data to be displayed could easily exceed the display area, page links were provided at the bottom, rather than showing all the information in one giant page.

#### User Ergonomics

The ease of use was the underlying principle behind the design of the screens. Some of the design aspects related to this are:

1. More personalized web site design. For example, once the user selects a particular tax type to work with, that tax type is used as the default tax type to pre-populate the tax type entry on the rest of the screens for that user.
2. For hands down data entry, an effort was made to make the application mouse-independent. The user has an option either to use the mouse or the keyboard. For example, the user could use the mouse to scroll down on the tax type box to select "010 – Sales and Use Tax" or could just key in 010 using the keyboard.
3. Consistency – All the screens have a common look and feel to avoid confusion.

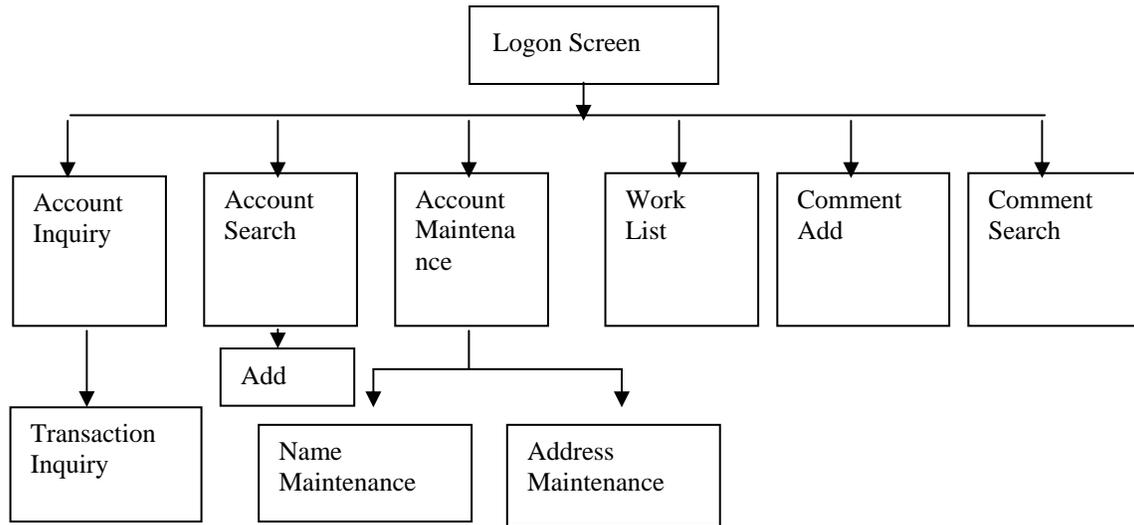
#### Use of Color to enhance user interface

The MIXER System uses color to enhance readability. The color scheme is as follows:

- All labels associated with enterable fields are **BLUE**.
- All labels associated with display only data fields are **BLACK**.
- All enterable fields are **BLACK** with white background.
- All display fields are **GREEN**.
- All navigation buttons are **MAROON**.
- The navigation button associated with the screen you are currently on, is **LIGHT BLUE**.
- In case of an error, the field in error is highlighted using **YELLOW**.

## Navigation Overview

The MIXER System allows for efficient navigation. The following is a schematic of all the screens



## Navigation methods

The top of all screens has the Navigation tool bar which the user can click to go to -

- The Account Inquiry Screen
- The Account Search Screen
- The Account Maintenance Screen
- The Work List Screen
- The Comment Add Screen
- The Comment Search Screen
- The Help Screen
- Logoff and return to the Logon Screen

## Help

The MIXER System provides extensive HELP functionality to the user. The help is provided using:

1. Balloon help - The user is presented with a brief help message when the user's mouse hovers over a particular field.
2. The Navigation tool bar has a HELP button to take the user to the Help associated with that screen. This is done using ROBOHELP at the screen level as well as the field level.

## Logon Screen

### **Purpose of the screen**

This screen is the home page of the MIXER System. This page will be the initial logon page and the timeout page for the Miscellaneous Taxes Registration System.

### **To get to the screen**

There are 3 ways to get to this screen:

1. This is the default page of the MIXER System. When a user visits this system (by clicking on an icon on the REVWEB application) this is the first page the user will see.
2. The timeout property of this application is set at 20 minutes. If the user doesn't perform any activity on the application for 20 minutes the system automatically logs the user out. The next time the user does anything on the system, the user will be taken back to the logon page.
3. If the user clicks the "Logoff" button on the tool bar on any page, the system takes the user to the logon page.

### **Data elements on the screen**

<b>Field Name</b>	<b>Description</b>	<b>Balloon Help</b>	<b>Length</b>
Userid	Text box for entering Revenue User Id. This is the mainframe IMS user id.	Enter your Revenue User ID	8
Password	Text box for entering Password of user This is the mainframe IMS user password	Enter your mainframe password	8

### **Buttons on the screen**

<b>Button Name</b>	<b>Button Functionality</b>
LOGON	validates the USERID and PASSWORD entered
HELP	brings up the help for the LOGON Screen

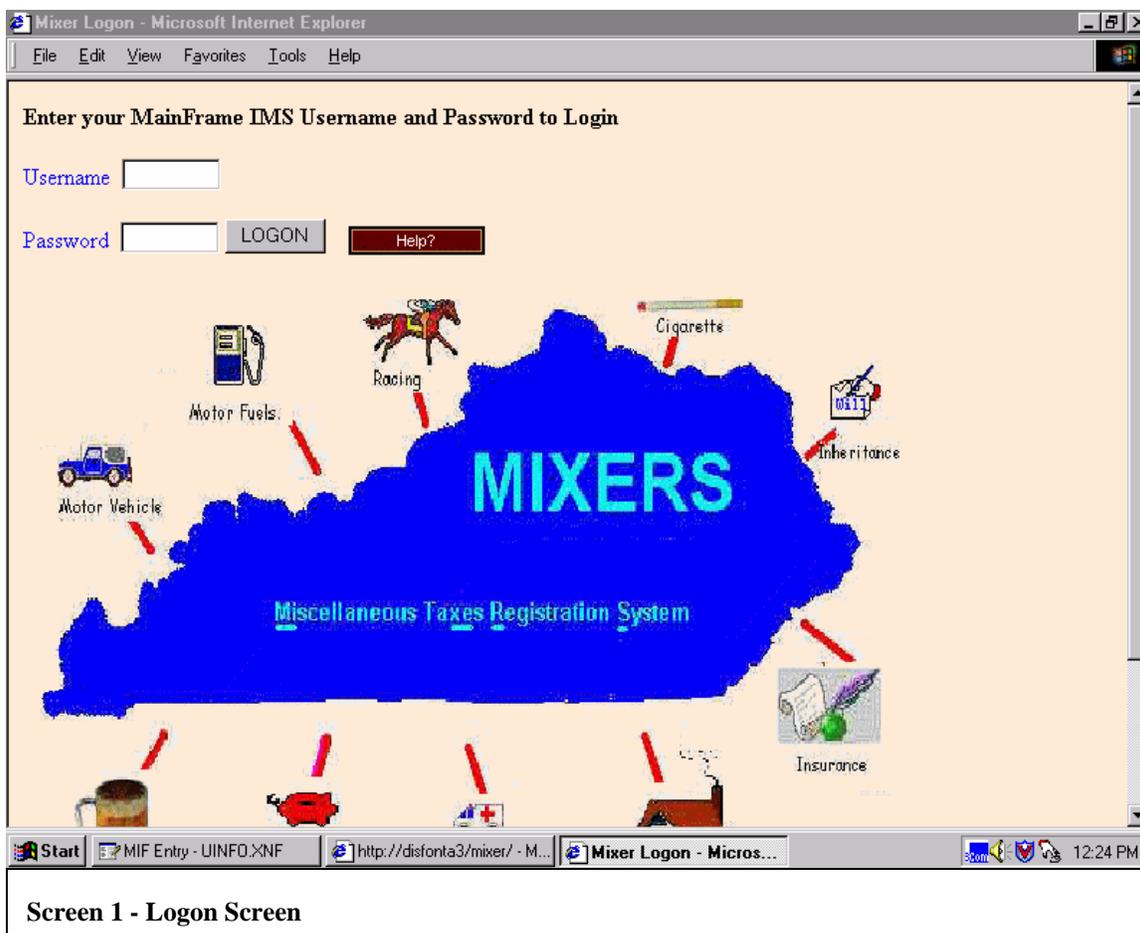
### **Edits**

<b>Error Condition</b>	<b>Error Message</b>	<b>Error Field</b>	<b>User Action</b>
The user clicks the LOGON button without entering at least 4 characters in the USERID Field	Please enter your IMS Mainframe userid	Userid	Enter you IMS Userid. Contact you security administrator if you don't have a valid mainframe Userid
The user clicks the LOGON button without entering at least 4 characters in the PASSWORD Field	Please enter your IMS Mainframe Password	Password	Enter you IMS Password

The user enters an invalid USERID and PASSWORD combination and clicks the LOGON button. These fields are checked using RACF on the mainframe	Enter Valid Userid and Password	Userid	Enter a valid IMS mainframe USERID and PASSWORD. This is the same as the one used to enter IMS (CARS, etc)
The user enters a valid USERID and PASSWORD combination. But the user is not defined to AAS as a valid CAR User.	User not defined to AAS	Userid	Contact your security administrator

### Processing on the screen

When the user clicks the LOGON button the system validates the Userid and Password. It then checks to see if the user has access on AAS as a CARS User. If all validations are correct then the system creates a session for the user on the system and takes the user to the Account Inquiry Screen.



## Account Inquiry Screen

### Purpose of the screen

The purpose of this screen is to provide details about a particular tax type and account number.

### To get to the screen

The user can get to this screen by 3 means:

1. Automatically after logon.
2. Clicking the INQUIRY button on the Navigation tool bar.
3. From the Account Search Screen, clicking on a particular tax type account number on the search grid provided the update option is not selected.

### Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Editable	TaxType	This is the tax type list box which lets the user select the tax type of the account the user wants to inquire on. The user can also key in the tax type – (example: key 046for TT046) If the user had selected a tax type on a previous screen then that tax type is automatically selected on this screen.	Enter a tax type or select one from the drop-down box	-
Editable	Account Number	Text box for entering the account number the user wants to inquire on. The system automatically prefills 0's if the entered number is not 12 digits long. The user can only enter numbers in this field. If the user had selected an account number on a previous screen ( example Search Screen), then the field is automatically pre-populated with that account number..	Account number to Display	12
Display Only	Account Name	This is the name on the account. If the account has a business name, that name is displayed. If an account is an individual's name, the name is displayed in the following order: <i>Prefix, First, Middle, Last, Suffix</i>		
Display Only	CRIS Number	The CRIS Number of the account.		
Display Only	Status	The status of the account.		
Display Only	Status Date	The date the account went into the current status.		
Display Only	FEIN	The FEIN of the account.		
Display Only	Filing Frequency	The filing frequency of the account.		
Display Only	SSN	The SSN of the account.		
Display Only	NAICS	The NAICS code of the account.		
Display Only	Class Code	The class code of the account.		
Display Only	Mix Number	The MIXER Number of the account.		
Display Only	Last update user	The last user to update the information on this account.		
Display Only	Last update time	The date/time the account was updated last.		
Display Only	Mailing Address	The mailing address of the account.		
Display Only	Mailing City,St,Zip	The city, state, and zip code of the mailing address.		

Display Only	Mailing Country	The country of the mailing address.		
Display Only	Mailing County, Only displayed if US address	The county of the mailing address.		
Display Only	Mailing Province Only displayed if non-US address	The province of the mailing address.		
Display Only	Mailing E-mail	The E-mail address of the account associated with the mailing address.		
Display Only	Mailing URL	The Universal Resource Locator (Web site address) of the account associated with the mailing address.		
Display Only	Mailing Phone	The phone number associated with the mailing address of the account.		
Display Only	Mailing FAX	The FAX number associated with the mailing address of the account.		
Display Only	Location Address	The location address of the account.		
Display Only	Location City, State, Zip	The city, state, and zip code of the location address.		
Display Only	Location Country	The country of the location address.		
Display Only	Location County, Only displayed if US address	The county of the location address.		
Display Only	Location Province Only displayed if non-US address	The province of the location address.		
Display Only	Location E-mail	The E-mail address of the account associated with the location address.		
Display Only	Location URL	The Universal Resource Locator (Web site address) of the account associated with the location address.		
Display Only	Location Phone	The phone number associated with the location address of the account.		
Display Only	Location FAX	The FAX number associated with the location address of the account.		

### **Buttons on the screen**

<b><i>Button Name</i></b>	<b><i>Button Functionality</i></b>
Get	The default button on the screen. After the user has entered the account number and selected a tax type, the user clicks this button to view information about the account.
Transactions	Clicking this button takes the user to the Transaction Search/Display Screen.

### **ToolBar Options**

Using the Navigation tool bar the user can go to –

- Account Search/Add
- Account Maintenance
- Work List

- Comments – Add
- Comments – Inquire
- Help
- Logoff

## **Edits**

<b><i>Error Condition</i></b>	<b><i>Error Message</i></b>	<b><i>Error Field</i></b>	<b><i>User Action</i></b>
The user clicks the GET button without entering an Account Number	Please enter an Account Number	AccNum	Enter an Account Number and then Click GET
The User Enters an Account Number and Tax Type Which doesn't Exist on MIXERS	Account Number not found	AccNum	Enter an Account Number, Tax Type which exists on MIXERS

## **Processing on the screen**

This screen displays information about an account on MIXERS. When the user comes to the screen the following can happen –

1. Prior to coming to this screen, if the user was working with a particular account then that account's details are displayed.
2. If this was the first time the user is coming to the screen then only tax type and account number fields are displayed and the rest of the screen is blank. After the user enters an account number and tax type and clicks 'GET', the information about the account is displayed.

If the user comes to this screen by clicking a particular account number on the Account Search Screen then information about that account is displayed. If the details of a particular account are being displayed on the screen and the user changes the account number or the tax type, then the detail section of the screen is blanked out. The details on the screen are no longer valid for the new account number/tax type entered.

MIXER - Inquiry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance Work List Comments/Add Comments/Inq Help? Logoff

Tax Type 028 - Racing Pari-mutuel Tax

Account Number 2 Find It! Transactions

Account Name RED MILE

CRIS Number	Status Active	Status Date
FEIN	Filing Freq	
SSN	NAICS	Class Code
Mix Number	Last Update User Time 07/01/2000 11:43:15 AM	

	Mailing Address	Location Address
Address	P O BOX 420	P O BOX 420
City,St,Zip	LEXINGTON KY 40585	LEXINGTON KY 40585
Country	USA	USA
County/Province	170 - Unknown or Illegible	170 - Unknown or Illegible
E-mail		
URL		
Phone	(606)255-0752	(606)255-0752
Fax		

Screen 2 – Inquiry Screen

## Transaction Inquiry/Search Screen

### ***Purpose of the screen***

The purpose of this screen is to provide a means of displaying accounting transactions in a user-friendly manner. The user should be able to display all transactions for a given account, as well as all transactions for any of the grouping types (FEIN, SSN, CRIS, or Mixer Number).

### ***To get to the screen***

The only way to get to this screen is by clicking the “Transactions” button on the Account Inquiry Screen.

### ***Data elements on the screen***

<b><i>Field Type</i></b>	<b><i>Field Name</i></b>	<b><i>Description</i></b>	<b><i>Balloon Help</i></b>	<b><i>Length</i></b>
Editable	Search Type	This is the Transaction Search Type list box that lets the user select the search type. The user can also key in the search type. The following are the various search types: <ul style="list-style-type: none"> <li>• Account Number (<b>default</b>).</li> <li>• Account Name.</li> <li>• CRIS Number</li> <li>• FEIN</li> <li>• MIXER Number</li> <li>• SSN</li> <li>• Transaction Name</li> <li>• Validating Number</li> </ul>	Select a Search Type from the drop-down box	-
Editable	Search Text	Input text field containing user entered search criteria. Specific edits will apply for each search type. In case of FEIN and SSN all 9 digits will have to be entered without any delimiters like ‘-’. In case of account number, MIXER number, CRIS number or validating number, the system will prefix 0’s. In case of account name search, the user has to enter more than 3 characters of the name. If there is a comma entered in the search name, it will be treated as an individual name. For Example – THOM – this will return all business names beginning with THOM; THOM,J – this will return all individuals with last names beginning with THOM and first names beginning with J; THOM, - this will return all individuals with last names beginning with THOM with any first name.	Enter search criteria for search type selected	Depends on Search Type

Editable	Tax Type	<p>This is the tax type list box that lets the user select the tax type of the account the user wants the transaction to be searched on. The user can also key in the tax type (example: key 046 for TT046). If the user had selected a tax type on a previous screen then that tax type is automatically selected on this screen.</p> <p>The following are the choices.</p> <ol style="list-style-type: none"> <li>Any of the tax types.</li> <li>'—ALL—' This will include all tax types in the search.</li> <li>Any of the filters. These are filters which let the user select a grouping of tax types. These groups are <ul style="list-style-type: none"> <li>Alcoholic Beverages Taxes Tax Types – 18 through 24</li> <li>Cigarette taxes Tax Types – 12, 16 and 17</li> <li>Insurance Taxes Tax Types – 32, 45 and 47</li> <li>Legal Process Taxes Tax Types – 14 and 68</li> <li>Motor Fuels Taxes Tax Types – 54, 55, 56, 77 and 92</li> <li>Racing Taxes Tax Types – 28, 29, 30 and 81</li> </ul> </li> </ol>	Enter Tax Type or Select one from the list.	12
Editable	Period	<p>This helps the user to narrow down the search for transactions by period. The user can either enter a date or a range of dates.</p> <p>For example, if user enters:  <b>01/01/1999</b> – Only Transactions with period after 01/01/1999 (inclusive) will display.  <b>01/01/1999-01/01/1999</b> – Only transactions for the specific 01/01/1999 period will display.  <b>01/01/1999-12/31/1999</b> - Only Transactions with period after 01/01/1999 (inclusive) and before 12/31/1999(inclusive) will display.</p>	Optional - enter a period range for the transactions	21 mm/dd/cc yy- mm/dd/cc yy
Editable	Sort By	<p>This allows the user to select the sort order of the transactions. This is a drop-down combo box with the following possible options :</p> <ul style="list-style-type: none"> <li>Tax Type, Account Number</li> <li>Period (descending)</li> <li>Process Date (descending)</li> <li>Transaction Code</li> <li>Type Return</li> <li>Validating Number</li> </ul>	Select a transaction sort option from the drop-down box	
Display Only	Period	The period of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	Transaction Code	The transaction code which met the search criteria.		Repeated up to 10 times

Display Only	Tax Type	The tax type of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	Account number	The account number of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	County Code	The county code of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	Type return	The type return of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	Validating Number	The validating number of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	Process Date	The process date of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	Transaction Amount	The transaction amount of the transaction which met the search criteria.		Repeated up to 10 times
Display Only	Transaction Name	The transaction name of the transaction which met the search criteria.		Repeated up to 10 times

### **Buttons on the screen**

<b><i>Button Name</i></b>	<b><i>Button Functionality</i></b>
Search Transactions	This is the default button on the screen. After the user has selected the search type and entered the search text, the user would click this button to invoke the search.
Page Navigation Line	The user has the ability to select any of the 10 pages listed. If the number of matches is more than 10 pages the user can select “Previous 10” and “Next 10” buttons to navigate through the list. <b>1-100 matches</b> – Page line shows up with links to Pages 1 through 10, but no Previous 10 and Next 10 buttons show. <b>101 – 500 matches</b> - Page line shows up with links to Pages 1 through 10. The “Previous 10” and “Next 10” buttons show up for user to navigate through all the matches. <b>500 + matches</b> - Error message requiring the user to narrow the search.

### **ToolBar Options**

Using the Navigation tool bar the user can go to –

- Account Inquiry
- Account Search/Add
- Account Maintenance
- Work List
- Comments – Add
- Comments – Inquire
- Help
- Logoff

## Edits

<i>Error Condition</i>	<i>Error Message</i>	<i>Error Field</i>	<i>User Action</i>
The user clicks the SEARCH button without entering a search text.	Please enter a search text	Search Text	Enters a valid search text for the selected search type and clicks SEARCH again.
User selects the account name or transaction name search but does not enter at least 3 characters	Please enter more than 3 characters for Name Search	Search Text	Enters a valid search text for the selected search type and clicks SEARCH again.
User selects the FEIN search but does not enter 9 digits	Please enter the 9 digit FEIN	Search Text	Enters the 9 digit FEIN and clicks SEARCH again.
User selects the SSN search but does not enter 9 digits.	Please enter the 9 digit SSN.	Search Text	Enters the 9 digit SSN and clicks SEARCH again
User selects the CRIS search but does not enter 6 digits.	Please enter the 6 digit CRIS number	Search Text	Enters the 6 digit CRIS Number and clicks SEARCH again.
Search exceeds 50 pages.	Search result exceeds 50 pages, please modify search criteria	Search Text	Modifies the search criteria and clicks SEARCH again.
No transaction accounts meet the search criteria	Search criteria not found	Search Text	Modifies the search criteria and clicks SEARCH again.
User enters invalid date (or date range)	Invalid Date	Period	Modifies the date to either be mm/dd/ccyy or mm/dd/ccyy-mm/dd/ccyy and clicks SEARCH again.

## Processing on the screen

This screen is used to search transactions on the MIXERS database. The following are the various Search Types –

1. Account Number (**default**) - The number entered is prefixed with 0's by the system. The system returns all transactions that have been posted under that account number.
2. Account Name - This lists all transactions that have an account name that matches the search criteria. User should enter more than 3 characters. Individual names must include ',' as a delimiter between the last name and the first name.
3. CRIS Number – This lists all transactions posted under all accounts with that CRIS number.
4. FEIN– This lists all transactions posted under all accounts with that FEIN.
5. MIXER Number – This lists all transactions posted under all accounts with that MIXER Number.
6. SSN – This lists all transactions posted under all accounts with that SSN.
7. Transaction Name - This list all transactions with the transaction name matching the search criteria. Please note that the transaction name can be different from the account name and that the transaction name is not split into first name, last name, middle initial etc. Transaction name is just one field, where as in account name it is distinguished between prefix, first , middle, last and suffix.
8. Validating Number - This lists all transactions posted with the validating number matching the search criteria.

Prior to coming to this screen if the user was working with a particular account then the transactions for that account are displayed (sorted by period).

If the search results of a particular search criteria are being displayed on the screen and the user changes the search criteria or the sort type, then the “results” section of the screen is blanked out. The details on the screen are no longer valid for the new criteria.

Transaction - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance Work List Comments/Add Comments/Inq Help? Logoff

Search Type: Account Number  
 Search Text: 726  
 Tax Type: 012 - Cigarette Enforcement & Administration  
 Sort By: Tax Type, Acct Num  
 Period:   
 Search Transactions

Period	Trn Cde	Tax Type	Account Number	County Code	Typ Rtn	Val Number	Process Date	Transaction Amount	Transaction Name
04/30/2000	01	012	000000000726		0	000726326	05/22/2000	\$0.16	EBY BROWN CO LP
04/30/2000	01	012	000000000726		0	000726325	05/22/2000	\$1,916.61	EBY BROWN CO LP

Page: | 1

Start MIF Entry - UINF... http://disfonta3/... Transaction - ... Microsoft Word 12:42 PM

**Screen 3 – Transaction Inquiry/Search Screen**

## Account Search Screen

### ***Purpose of the screen***

This screen lets the user search for a particular account on the MIXER System. The user can also go to the Add Account Process from this screen. To prevent duplicate accounts, users should verify that a particular account doesn't exist on MIXERS by performing various searches before proceeding with adding an account .

### ***To get to the screen***

The user can get to this screen from various MIXERS screens by using the Search/Add button on the Navigation tool bar.

### ***Data elements on the screen***

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Editable	Search Type	This is the Account Search Type list box that lets the user select the search type. The user can also key in one of the following Search Types: <ul style="list-style-type: none"> <li>• Account Number (<b>default</b>).</li> <li>• Account Name.</li> <li>• CRIS Number</li> <li>• FEIN</li> <li>• Mixer Number</li> <li>• SSN</li> <li>• Transaction Name</li> <li>• Validating Number</li> </ul>	Enter a search type or select one from the drop-down box	-
Editable	Search Text	Input text field containing user entered search criteria. Specific edits will apply for each search type. In case of FEIN and SSN all 9 digits will have to be entered without any delimiters. In case of account number, Mixer number, CRIS number or validating number, the system will prefix 0's. A comma entered in the search name field will be treated as an individual name. Examples – THOM – this will return all business names beginning with THOM; THOM,J – this will return all individuals with last names beginning with THOM and first names beginning with J; THOM, - this will return all individuals with last names beginning with THOM with any first name .	Enter search criteria for search type selected	Depends on Search Type

Editable	Tax Type	<p>This is the Tax Type list box that lets the user select the tax type of the account the user wants to search for.</p> <p>The user can also key in the tax type – (example: key 046 for TT046).</p> <p>If the user had selected a tax type on a previous screen that tax type is automatically selected on this screen.</p> <p>The following are the choices.</p> <ol style="list-style-type: none"> <li>Any of the tax types.</li> <li>‘—ALL—’ This will include all tax types in the Search.</li> <li>Any of the filters. These are filters, which lets the user select on a particular grouping of tax types. These groups are <ul style="list-style-type: none"> <li>Alcoholic Beverages Taxes Tax Types – 18 through 24</li> <li>Cigarette taxes Tax Types – 12, 16 and 17</li> <li>Insurance Taxes Tax Types – 32, 45 and 47</li> <li>Legal Process Taxes Tax Types – 14 and 68</li> <li>Motor Fuels Taxes Tax Types – 54, 55, 56, 77 and 92</li> <li>Racing Taxes Tax Types – 28, 29, 30 and 81</li> </ul> </li> </ol>	Enter a tax type or select one from the drop down box.	12
Editable	Update	A check box that helps in navigation. If this box is checked and the user clicks on one of the accounts listed in the table, the system takes the user to the maintenance screen for that account.	Check box and double click on account number to maintenance the account	Check Box
Display Only	Tax Type	The tax type of the account which met the search criteria.		Repeated up to 10 times
Display Only With a hyper link	Account number	The account number of the account which met the search criteria.		Repeated up to 10 times
Display Only	Status	The status of the account which met the search criteria.		Repeated up to 10 times
Display Only	Status Date	The status date of the account which met the search criteria.		Repeated up to 10 times

### **Buttons on the screen**

<b>Button Name</b>	<b>Button Functionality</b>
Search Accounts	The default button on the screen. After the user has selected the search type and entered the search text, the user clicks this button to invoke the search.
Add Accounts	This button takes the user to the add process.

Page Navigation Line	<p>The user has the ability to select any of the 10 pages listed. If the number of matches is more than 10 pages the user can select “Previous 10” and “Next 10” buttons to navigate through the list.</p> <p><b>1-100 matches</b> – Page line shows up with links to Pages 1 through 10, but no Previous 10 and Next 10 buttons show.</p> <p><b>101 – 500 matches</b> - Page line shows up with links to Pages 1 through 10. The “Previous 10” and “Next 10” buttons show up for user to navigate through all the matches.</p> <p><b>500 + matches</b> - Error message requiring the user to narrow the search.</p>
----------------------	--

## ToolBar Options

Using the Navigation tool bar the user can go to –

- Account Maintenance
- Work List
- Comments – Add
- Comments – Inquire
- Help
- Logoff

## Edits

<i>Error Condition</i>	<i>Error Message</i>	<i>Error Field</i>	<i>User Action</i>
The user clicks the SEARCH button without entering a search text	Please enter a search text	Search Text	Enters a valid search text for the selected search type and clicks SEARCH again
User selects the FEIN search but does not enter 9 digits	Please enter the 9 digit FEIN	Search Text	Enters the 9 digit FEIN and clicks SEARCH again
User selects the CRIS search but does not enter 6 digits	Please enter the 6 digit CRIS	Search Text	Enters the 6 digit CRIS Number and clicks SEARCH again
Search exceeds 50 pages	Search result exceeds 50 pages, please modify search criteria	Search Text	Modifies the search criteria and clicks search again
No accounts meet the search criteria	Search criteria not found	Search Text	Modifies the search criteria and clicks search again.

## Processing on the screen

This screen is used to do searches on the MIXERS database. The following are the various search types:

1. Account Number (**default**) - The number entered is prefixed with 0's by the system.
2. Account Name - The user should enter more than 3 characters. Individual names must include a ',' (comma) as a delimiter between the last name and the first name.
3. CRIS Number
4. FEIN
5. MIXER Number
6. SSN
7. Transaction Name

Lists all accounts which have had a transaction posted under them with the transaction name matching the search criteria. Please note that the transaction name can be different

from the account name and that the transaction name is just one field and is not split into first name, last name, middle initial.

8. Validating Number

Lists all accounts which have had a transaction posted under them with the validating number matching the search criteria.

If the search results of a particular search criteria are being displayed on the screen and the user changes search criteria, then the “results” section of the screen is blanked out. The details on the screen are no longer valid for the new search criteria.

The screenshot shows a web browser window titled "Account Search - Microsoft Internet Explorer". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The application interface has a top navigation bar with buttons for Inquiry, Search/Add, Maintenance, Work List, Comments/Add, Comments/Inq, Help?, and Logoff. Below this is a search form with the following fields:

- Search Type: Account Number (dropdown)
- Search Text: 010 (text input)
- Tax Type: 059 - Motor Vehicle Usage Tax (dropdown)
- Update:
- Buttons: Search Accounts, Add Accounts

The search results are displayed in a table with the following data:

Tax Type	Account Number	Account Name	Status	Status Date
059	<a href="#">000000000010</a>	BOYD CO CLERK	Active	

Below the table, it says "Page: | 1". The Windows taskbar at the bottom shows the Start button, several open applications (MIF Entry - UINF..., http://disfonta3/..., Account Sear..., Microsoft Word), and the system tray with the time 12:28 PM.

Screen 4 – Account Search Screen

## Add Account Screens

### Add Process overview

The purpose of this process is to allow users to add new accounts to the MIXER System after first performing the search function to make sure the account does not already exist. Adding an account is a 2-step process. On the first page the user enters the basic information (Example: Filing freq., NAICS code, etc) which is only pertinent to that particular account number and is not shared with other accounts under the same entity. It also has all the identifiers (CRIS number, FEIN, etc) associated with the account. It is on the second page that the user enters demographic information (name, address, etc) that the account number might share with other accounts under the same entity. This is so that the system can pre-populate the demographic information from other accounts within the same group (grouping information is on the first page).

### Add Screen 1

#### Purpose of the screen

This screen is the first screen in the add process. On this screen the user enters some information about the account.

#### To get to the screen

The user can get to this screen by clicking the “Add Account” button on the Account Search Screen.

#### Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Editable	Tax Type	This is the tax type list box that lets the user select the tax type of the account the user wants to add. The user can also key in the tax type - for example: 046. If the user had selected a tax type on a previous screen then that tax type is automatically selected on this screen.	Enter Tax Type or Select one from the drop down box	
Editable	Account Number	This is the account number of the account the user wants to add. The user can only key in numeric values in this field. The system will prefix 0's to the number entered to make it a 12-digit number.	Account Number to Add	12
Editable	System Assigned	This is a check box to indicate if the user wants the system to generate an account number.	Check box to have the system assign an account number	
Editable	CRIS Number	This is the CRIS number of the account the user wants to add. The user can only key in numeric values in this field.	CRIS associated with the Account number	6
Editable	FEIN	This is the FEIN of the account the user wants to add. The user can only key in numeric values in this field.	FEIN associated with the Account number	9

Editable	SSN	This is the SSN of the account the user wants to add. The user can only key in numeric values in this field.	SSN associated with the Account number	9
Editable	MIXER Number	This is the MIXER number of the account the user wants to add. The user can only key in numeric values in this field. This number is similar in concept to the CRIS number in the CRIS system, which helps in tying together accounts in the various tax systems (ex. Sales tax, Withholding, Business tax, Coal tax systems). The MIXER number will be used to group accounts together for tax paying entities who don't have a CRIS number.  The system will prefix 0's to the number entered to make it a 12 digit number.	MIXER number associated with the Account number	12
Editable	System Assigned	This is a check box to indicate if the user wants the system to generate a MIXER number.	Check box to have the system assign a MIXER number	
Editable	Class Code	This is a drop down list box which lets the user choose a class code for the account. These values are from the class code table with 'N/A' as the default. Class codes are used only with certain type taxes and are tax specific.	If this tax type has a class code select one from the drop-down box	
Editable	Status	This is a drop down list box which lets the user choose a status code for the account. These values are from the CODE table with 'Active' as the default.	Select a Status from the drop-down box	
Editable	Status Date	This is the status date for the account. This field defaults to the current date. The date should be entered in mm/dd/ccyy format.	Enter a beginning date for the status	10
Editable	Filing Frequency	This is a drop down list box that lets the user choose a filing frequency for the account. These values are from the CODE table with 'N/A' as the default. An edit will require the user to select a filing frequency.	Select a Filing Frequency from the drop-down box	
Editable	NAICS code	This is the NAICS code for the Account.	Optional – enter the NAICS code or click on FIND IT to view all NAICS codes	6

### **Buttons on the screen**

<b><i>Button Name</i></b>	<b><i>Button Functionality</i></b>
Find It	This button is displayed beside the NAICS code associated with the account. When the user clicks this button, a separate window shows up which takes the user to the U.S. Census Bureau web site which has all the NAICS codes and their descriptions listed.
Continue	This takes the user to page 2 of the add process provided there are no edit errors on this screen.
Clear	This clears all the entries on the screen after confirming with the user. When the user clicks this button for the first time the system issues a prompt – “Are you sure you want to clear the data?”

## ToolBar Options

The user can quit the add process by selecting any of the options from the tool bar. Using the Navigation tool bar the user can go to –

- Account Inquiry
- Account Maintenance
- Work List
- Comments – Add
- Comments – Inquire
- Help
- Logoff

## Edits

<i>Error Condition</i>	<i>Error Message</i>	<i>Error Field</i>	<i>User Action</i>
The user clicks the Continue button but the account number entered already exists in MIXERS.	Account number exists on MIXERS for this tax type	Account Number	User can either cancel the Add or enter a new Account number
The user clicks the Continue button and has checked the “System Assigned?” box as well as entered an Account number.	Please enter account number or select system assigned	Account Number	User can only choose one of the options
The user clicks the Continue button but both the account number is blank and the “System Assigned” box is unchecked.	Please enter account number or select System Assigned	Account Number	User chooses one of the options
The user clicks the Continue button and has the “System Assigned” checked for the Account Number but the tax type selected cannot have a system-generated number.	System cannot generate an account number for this tax type	Tax type	User enters an Account number and unchecks the generate #.
The user clicks the Continue button and has a CRIS number but the CRIS number doesn’t have 6 digits	Please enter the 6 digit CRIS number	CRIS	Enters the 6 digit CRIS number
The user clicks the Continue button and has a FEIN but the FEIN doesn’t have 9 digits	Please enter the 9 digit FEIN	FEIN	Enters the 9 digit FEIN
The user clicks the Continue button and has a SSN but the SSN doesn’t have 9 digits	Please enter the 9 digit SSN	SSN	Enters the 9 digit SSN
User selects a class code but the class code is not valid for the tax type.	Please select a valid class code	Class Code	User select a valid Class Code
User enters an invalid date. The date is to be entered in mm/dd/ccyy format.	Invalid Date	Status Date	Enters a valid Date
User selects generate MIXER number but has FEIN, CRIS or SSN and selects continue button.	Cannot generate MIXER number with FEIN, CRIS or SSN	Generate Mix #	User unchecks the Generate Mix #

## Processing on the screen

The information entered on this page is used to pre-populate fields on the next screen and is used there to complete the add process. If there are edit errors on the screen, the user will be stopped on this page and a message will appear stating that the user cannot proceed with this function.

Search/Add - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance Work List Comments/Add Comments/Inq Help? Logoff

Fill in all known information

Tax Type	016 - Cigarette Tax
Account Number	
System Assigned?	<input type="checkbox"/>
CRIS Number	
FEIN	
SSN	
MIXER Number	
System Assigned?	<input type="checkbox"/>
Class Code	054-A
Status	Active
Status Date	06/05/2000
Filing Frequency	One Time Only - Required to file only one return i.e. Inheritance -1
NAICS Code	<input type="text"/> Find It!

Press Continue to proceed with adding a new Account

Continue Clear

Start MIF Entry - UINF... http://disfonta3/... Search/Add - ... Microsoft Word 12:32 PM

**Screen 5 – Add Screen 1**

## Add Screen 2

### Purpose of the screen

On this page the user enters demographic information (name, address, etc.) of the account. It is done this way so that the system can pre-populate the demographic information from other accounts within the same group (grouping information is on the first page).

The design of this page was done in this fashion for the following reasons:

- Easy to use. Once an account name, address has been entered for one account for that taxpayer, the chances are that the same name will be carried over to other accounts.
- Data consistency. By providing for the system to pre-populate the name and address fields data would be more consistent (less typo errors, and more standardization).

## How can you get to the screen

The user can get to this page by clicking the “Continue” button on Page 1 of the Add process.

## Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Display	Tax Type	This is the tax type of the account being added. This was entered on Page 1.		
Display	Account Number	This is the account number of the account being added. This was entered on Page 1. If the user selected a system generated number it will be assigned after the add is complete.		12
Editable	Known Names Combo Box	Drop-down box of all known names for any accounts having the same grouping as entered on page 1 of the add process. This box is only displayed if there are other accounts in MIXERS with the same account identifiers (i.e. FEIN, CRIS, SSN or MIXER number). When the user selects a particular name then the account name field is populated with that name.	Select an account name from the drop-down box or enter a name in the account name field	
Editable	Account Name	This is the account name for a business. It should be entered without any punctuation.	Enter an account name for the business or individual	30
Editable	Prefix	This is the prefix (Mr. Ms etc) of the account name for an individual. It should be entered without punctuation.	Enter the Prefix name of the individual	10
Editable	First Name	This is the first name for an individual. It should be entered without punctuation.	Enter the First Name	50
Editable	Middle Name	This is the middle initial for an individual. It should be entered without punctuation.	Enter the Middle Name	50
Editable	Last Name	This is the last name for an individual. It should be entered without punctuation.	Enter the Last Name	50
Editable	Suffix Box	This is the suffix (Esq., I, II,III etc) for an individual. It should be entered without punctuation.	Enter the Suffix name of the individual	10
Editable	Known Mailing Addresses Combo Box	Drop- down box of all known mailing addresses for any accounts having the same grouping as entered on page 1 of the add process. This box is only displayed if there are other accounts in MIXERS with the same account identifiers (i.e. FEIN, CRIS, SSN or MIXER number). When the User selects a particular address, all fields related to the Mailing address are pre-filled with the address selected.	Select an address from the drop-down box or enter an address in the address fields	
Editable	Mailing Address line 1	This is the 1 <sup>st</sup> line of the mailing address.	Enter the first line of the mailing address	30
Editable	Mailing Address line 2	This is the 2 <sup>nd</sup> line of the mailing address.	Optional – Enter the second line of the mailing address	30

Editable	Mailing Address line 3	This is the 3 <sup>rd</sup> line of the mailing address.	Optional – Enter the third line of the mailing address	30
Editable	Mailing City	This is the city of the mailing address.	Mailing Address city	50
Editable	Mailing State	This is the state of the mailing address. It defaults to N/A	Select a state	
Editable	Mailing Zip	This is the zip code of the mailing address.	Mailing Address Zip	
Editable	Mailing Country	This is the country of the mailing address. It defaults to N/A	Select the country	
Editable	Mailing County	This is the county of the mailing address	Select the County of the address from the drop down box	
Editable	Mailing Province	This is the province of the mailing address.	Optional Province Name	30
Editable	Mailing E-mail address	This is the e mail of the mailing address.	Optional – enter the e-mail address	30
Editable	Mailing address URL.	This is the URL at the mailing address. Universal Resource Locator (URL) is also known as the web site address.	Optional Web site Name	30
Editable	Mailing address phone number	This is the phone number at the mailing address.	Optional – enter the phone number for the mailing address	10
Editable	Mailing address Fax number	This is the fax number at the mailing address.	Optional – enter the Fax number for the mailing address	10
Editable	Same as Mailing address	Checking this box protects all the location address fields and populates the location address fields with the mailing address fields.	Check box to populate location address with mailing address	
Editable	Known Location Addresses Combo Box	Drop down box of all known location addresses for any accounts having the same grouping as entered on page 1 of the add process. This box is only displayed if there are other accounts in MIXERS with the same account identifiers (i.e. FEIN, CRIS, SSN or MIXER number). When the User selects a particular address, all fields related to the location address are prefilled with the address selected.	Select an address from the drop-down box or enter an address in the address fields	
Editable	Location Address line 1	This is the 1 <sup>st</sup> line of the location address.	Enter the first line of the Location address	30
Editable	Location Address line 2	This is the 2 <sup>nd</sup> line of the location address.	Optional – Enter the second line of the Location address	30
Editable	Location Address line 3	This is the 3 <sup>rd</sup> line of the location address.	Optional – Enter the third line of the Location address	30
Editable	Location City	This is the city of the location address.	Location Address city	50
Editable	Location State	This is the state of the location address. It defaults to N/A	Select state	
Editable	Location Zip	This is the zip code of the location address.	Location Address Zip	
Editable	Location Country	This is the country of the location address. It defaults to N/A.	Select country	
Editable	Location County	This is the county of the location address.	Select the County of the address from the drop down box	
Editable	Location Province	This is the province of the location address.	Optional - enter Province Name	30

Editable	Location E-mail address	This is the e mail of the location address	Optional – enter the e-mail address	30
Editable	Location address URL.	This is the URL at the location address. Universal Resource Locator (URL) is also known as the web site address.	Optional Web site Name	30
Editable	Location address phone number	This is the phone number at the location address.	Optional – enter the phone number for the Location address	10
Editable	Location address Fax number	This is the fax number at the location address.	Optional – enter the Fax number for the Location address	10

### **Buttons on the screen**

<b>Button Name</b>	<b>Button Functionality</b>
Save	This adds the account to MIXERS and takes the user to the inquiry screen for the newly added account.
Back	This takes the user to Page 1 of the add process.
Clear	This clears all the entries on the screen after confirming with the user. When the user clicks this button for the first time the system issues a prompt – “Are you sure you want to clear the data?”
Cancel Add	This cancels the add process. When the user clicks this button for the first time the system issues a prompt – “Are you sure you want to cancel the add?”. If the user answers ”Yes” the system goes back to the Account Search Screen.

### **ToolBar Options**

There is no Navigation tool bar on this page. The user has to either cancel the add process or finish the add process before they can go to any other screens.

### **Edits**

<b>Error Condition</b>	<b>Error Message</b>	<b>Error Field</b>	<b>User Action</b>
Both Account Name and Last Name are blank	Please enter either enter last name or business name	Account Name	User enters either Business name or Last name and First Name
Mailing Address line 1 is blank	Please enter account mailing address	Mailing Address Line 1	User enters Mailing Address line 1
Entry on address line 2 or 3 but address line 1 blank; or Entry on address line 1 and 3 but line 2 is blank; or Entry on address line 3 only.	Please begin address on address line 1	Mailing Address Line 1	User enters Mailing Address line 1
Mailing City is blank	Please enter city	Mailing City	User enters City
Country is USA but mailing Zip is blank	Please enter zip	Mailing Zip	User enters the Zip Code
Country is USA but mailing Province is not blank	Province cannot be entered with USA	Mailing Province	User corrects the Country or deletes the Province.
State is KY but county has not been selected.	Please enter county code	County Code	User selects a county code

Location Address line 1 is blank	Please enter account location address	Location Address Line 1	User enters Location Address line 1
Entry on address line 2 or 3 but address line 1 blank; or Entry on address line 1 and 3 but line 2 is blank; or Entry on address line 3 only.	Please begin address on address line 1	Location Address Line 1	User enters Location Address line 1
Location City is blank	Please enter city	Location City	User enters City
Country is USA but Location Zip is blank	Please enter zip	Location Zip	User enters the Zip Code
Country is USA but Location Province is not blank	Province cannot be entered with USA	Location Province	User corrects the Country or deletes the Province.
State is KY but county has not been selected.	Please enter county code	Location County Code	User selects a county code

## Processing on the screen

During the processing of this screen the system uses information from page 1 and page 2 of the add process. Once the "Save" button has been clicked, all information that has been entered on pages 1 and 2 will be saved to the database.

If the user has indicated that an account number needs to be generated then the system will generate an account number. If the add process is successful, the system takes the user to the Account Inquiry Screen for the newly added account.

Search/Add - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Tax Type 016 Account Number

Account Name

---OR---

(Prefix) (First) (Mid) (LastName) (Suffix)

[Location-Address](#)

Mailing Address

Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
City, State, Zip	<input type="text"/> N/A <input type="text"/>
Country	N/A
County	001 - Adair
Province	<input type="text"/>
E-mail	<input type="text"/>
URL	<input type="text"/>
Phone	<input type="text"/>
FAX	<input type="text"/>

Start MIF Entry - UINF... http://disfonta3/... Search/Add - ... Microsoft Word 12:35 PM

Search/Add - Microsoft Internet Explorer

File Edit View Favorites Tools Help

FAX

Same as Mailing Address [Mailing-Address](#)

Location Address

Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
City, State, Zip	<input type="text"/> N/A <input type="text"/>
Country	N/A
County Province	001 - Adair
E-mail	<input type="text"/>
URL	<input type="text"/>
Phone	<input type="text"/>
FAX	<input type="text"/>

Save Back Clear Cancel Add

Start MIF Entry - UINF... http://disfonta3/... Search/Add - ... Microsoft Word - ... 12:37 PM

**Screen 7 – Add Screen 2 – Location Address Portion**

# Maintenance Screen

## Purpose of the screen

The purpose of this page is to allow the user to update existing accounts on MIXERS, updating basic information on this page. It also provides links to the name update page, and the address update page. It is done this way so that the user can change the name and address of multiple accounts with just a few clicks of the mouse.

## To get to the screen

1. The user can get to this screen by clicking the “Maintenance” button on the Account Search Screen.
2. The system brings the user to this screen while working the “missing demographics” work list.

## Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Editable	Tax Type	This is the tax type list box that lets the user select the tax type of the account the user wants to update. The user can also key in the tax type - for example: 046. If the user had selected a tax type on a previous screen then that tax type is automatically selected on this screen.	Enter Tax Type or Select one from the list.	
Editable	Account Number	This is the account number of the account the user wants to update. The user can only key in numeric values in this field. The system will prefix 0's to the number entered to make it a 12-digit number.	Enter Account Number to be maintained	12
Display Only	Account Name	This is the name on the account. This is for informational purposes only on this screen.		
Editable	CRIS Number	This is the CRIS number of the account. The user can only key in numeric values in this field.	Enter CRIS associated with Account number	6
Editable	FEIN	This is the FEIN of the account. The user can only key in numeric values in this field.	Enter FEIN associated with the Account number	9
Editable	SSN	This is the SSN of the account. The user can only key in numeric values in this field.	Enter SSN associated with the Account number	9
Editable	MIXER Number	This is the MIXER number of the account. The user can only key in numeric values in this field. This number is similar in concept to the CRIS number in the CRIS system, which helps in tying together accounts in the various business tax systems (ex. Sales tax, Withholding, Corporation tax, Coal tax systems). MIXER number will be used to group accounts together for tax paying entities who don't have a CRIS number.  The system will prefix 0's to the number entered to make it a 12 digit number.	Enter MIXER number associated with the Account number	12

Editable	System Assigned	This is a check box to indicate if the user wants the system to generate a MIXER number.	Check box to have the system assign a MIXER number	
Editable	Class Code	This is a drop- down box which lets the user choose a class code for the account. These values are from the CODE table with 'N/A' as the default. Class codes are used only with certain tax types and are tax specific.	If this tax type has class codes select one from the drop-down box	
Editable	Status	This is a drop- down box which lets the user choose a status code for the account. These values are from the CODE table with 'active' as the default.	Select a status code from the drop-down box	
Editable	Status Date	This is the status date for the account. Date is to be entered in mm/dd/ccyy format.	Enter the beginning date for the status entered	10
Editable	Filing Frequency	This is a drop- down box that lets the user choose a filing frequency for the account. These values are from the CODE table with 'N/A' as default. An edit will require the user to select a filing frequency.	Select a Filing Frequency from the drop-down box	
Editable	NAICS code	This is the NAICS code for the account.	Optional – enter the NAICS code or click on FIND IT to view all NAICS codes	6
Display Only	Last Update	This is the user name and date and time of last update.		

### **Buttons on the screen**

<b>Button Name</b>	<b>Button Functionality</b>
Save	This updates the account information.
Release	This cancels the changes and takes the screen back to “display mode”.
Name Maintenance	This takes the user to the name update screen for that particular account.
Address Maintenance	This takes the user to the address update screen for that particular account.
Find It	This button is displayed beside the NAICS code associated with the account. When the user clicks this button, a separate window shows up which takes the user to the U.S. Census Bureau web site which has all the NAICS codes and their descriptions listed.

### **ToolBar Options**

Using the Navigation tool bar while in display mode the user can go to –

- Account Inquiry
- Account Search/Add
- Work List
- Comments – Add
- Comments – Inquire
- Help
- Logoff

## Edits

<i>Error Condition</i>	<i>Error Message</i>	<i>Error Field</i>	<i>User Action</i>
The user clicks the Get button but the account number entered doesn't exist in MIXER	Account number not found	Account Number	User corrects the account number
The user clicks the Save button and has entered a CRIS number but the CRIS number doesn't have 6 digits	Please enter 6 digit CRIS number	CRIS	Enters the 6 digit CRIS number
The user clicks the Save button and has entered a FEIN but the FEIN doesn't have 9 digits.	Please enter 9 digit FEIN	FEIN	Enters the 9 digit FEIN
The user clicks the Save button and has entered a SSN but the SSN doesn't have 9 digits.	Please enter 9 digit SSN	SSN	Enters the 9 digit SSN
The user selects a class code but the class code is not valid for the tax type.	Please select a valid class code	Class Code	User select a valid Class Code
The user enters an invalid date. The date is to be entered in mm/dd/ccyy format.	Invalid Date	Status Date	Enters a valid Date
The user selects generate MIXER # but has FEIN, CRIS or SSN and selects continue button.	Cannot generate MIXER number with FEIN, CRIS or SSN	Generate Mix #	User unchecks the Generate Mix #

## Processing on the screen

This screen has 2 modes:

1. Display Mode – This is the mode where all the information about a particular account is displayed on the screen, but is not updateable. Within this mode the screen can have 2 different looks.
  - If there is no account information to display then only the tax type and the account number fields are shown.
  - If there is account information to display then the tax type and the account number fields are shown. Also shown are the Name and Address Maintenance buttons and all other fields in non-updateable format. The screen comes up in display mode for the account number the user was previously working on. The user clicks on “get” on that account or any other account to bring up that account in Update Mode.
2. Update Mode – This is the mode where the user can change information on the screen for a particular account. The account is put on ‘hold’ for that user, so that no two users can get to the same account at the same time for maintenance.
  - When the user clicks on Release, the system discards all the changes and brings up the screen in display mode.
  - When the user clicks Save, the system updates the account information and brings up the screen in display mode.

Account Maintenance - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance Work List Comments/Add Comments/Inq Help? Logoff

Tax Type 059 Account Number 00000000010

Name Maintenance Address Maintenance

Account Name	BOYD CO CLERK
CRIS Number	
FELN	
SSN	
MIX Number System Assigned MIX Number?	00000000011 <input type="checkbox"/>
Class Code	000-N/A
Status	Active
Status Date	
Filing Frequency	Weekly - Return/payment due on weekly basis -3
NAICS Code	<input type="text"/> Find It!
Last Update	REV0869 06/05/2000 2:54:38 PM

Save Release

Start MIF Entry - UINFO.XNF http://disfonta3/mixer/ ... Account Mainten... Microsoft Word 12:45 PM

**Screen 8 – Account Maintenance Screen**

## Name Maintenance Screen

### Purpose of the screen

The purpose of this page is to allow users to update the name for an account.

The design of this page was done in this fashion for the following reasons:

- Easy to use. The user can update the name of multiple accounts at same time. All existing accounts for the grouping will be displayed. The user can select the account names they want to update by clicking the check box.
- Data consistency. By providing for the capability to update multiple accounts, the name fields data would be more consistent (less typo errors, and more standardization).

### To get to the screen

The user can get to this page by clicking the “Name Maintenance” button on the Account Maintenance screen.

### Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Display	Tax Type	This is the tax type of the account being updated.		
Display	Account Number	This is the account number of the account being updated.		12
Display	Unformatted Account Name	For a system added account, the system may not be able to parse the name into prefix, first, last etc. In such a case the system will put the name in this field. The user cannot update this field, but can use this information to enter the rest of the fields.		30
Editable	Account Name	This is the account name for a business.	Enter an account name for the business or the individual	30
Editable	Prefix	This is the prefixes (Mr. Ms etc) of the account name for an individual.	Prefix	10
Editable	First Name	This is the first name for an individual.	First Name	50
Editable	Middle Name	This is the middle initial for an individual.	Middle Name	50
Editable	Last Name	This is the last name for an individual.	Last Name	50
Editable	Suffix Box	This is the suffix (Esq., I, II,III etc) for an individual.	Suffix	10
Editable	Update	This user checks this to indicate that the name of this account needs to be updated as well.	Update the account?	Displayed as many times as there are accounts in the group
Display	Tax Type	This is the tax type of the account in the group.		Displayed as many times as there are accounts in the group

Display	Account Number	This is the account number of the account in the group.		Displayed as many times as there are accounts in the group
Display	Account Name	This is the name of the account		Displayed as many times as there are accounts in the group
Display	Status Code	This is the status of the account.		Displayed as many times as there are accounts in the group

### **Buttons on the screen**

<b>Button Name</b>	<b>Button Functionality</b>
Save	This updates the account Name.
Cancel	This cancels the changes on the screen
Back	This takes the user to the Account Maintenance Screen.

### **ToolBar Options**

There is no tool bar on this page. The user has to go back to the Account Maintenance Screen.

### **Edits**

<b>Error Condition</b>	<b>Error Message</b>	<b>Error Field</b>	<b>User Action</b>
Both Account Name and Last Name are blank	Please enter either last name & first name or business name	Account Name	User enters either Business name or Last name and First Name
Name entered in both Account Name and Last Name	Please enter either last name & first name or business name	Account Name	User enters either Business name or Last name and First Name

### **Processing on the screen**

This screen lets the user update the name on the account and allows the user to apply the update to any other account in that “group”. A “group” is list of accounts which share the same identifiers (CRIS number, FEIN, SSN, MIXER number). This lets the user update all accounts for an entity at the same time. After making all necessary changes the user should go back to the Account Maintenance screen and click the save button.

Name Maintenance - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Tax Type 059 Account Number 000000000059  
 Account Name KENTON CO CLERK  
 ---OR---  
 (Prefix) (First) (Mid) (LastName) (Suffix)

Update?	Tax Type	Account Number	Account Name	Status Code
<input type="checkbox"/>	014	000000000059	KENTON CO CLERK	01 - Active
<input type="checkbox"/>	052	000000000059	KENTON CO CLERK	01 - Active
<input type="checkbox"/>	068	000000000059	KENTON CO CLERK	01 - Active

Save Cancel Back

Start MIF Entry - UINF... http://disfonta3/... Name Mainte... Microsoft Word 8:31 AM

**Screen 9 – Name Maintenance Screen**

## Address Maintenance

### Purpose of the screen

The purpose of this page is to allow users to update mailing and location addresses for an account. The design of this page was done in this fashion for the following reasons:

- Easy to use. User can update the mailing address and the location address of multiple accounts at same time. On the table, all existing accounts for the grouping will be displayed. The user can select the addresses (by clicking the check box) they want to update.
- Data consistency. By providing for the capability to update multiple accounts , the address fields data would be more consistent (less typo errors, and more standardization).

### To get to the screen

The user can get to this page by clicking the “Address Maintenance” button on the Account Maintenance screen

### Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Display	Tax Type	This is the tax type of the account being updated.		
Display	Account Number	This is the account number of the account being updated.		12
Editable	Mailing Address line 1	This is the 1 <sup>st</sup> line of the mailing address.	Mailing address line 1	30
Editable	Mailing Address line 2	This is the 2 <sup>nd</sup> line of the mailing address.	Mailing address line 2	30
Editable	Mailing Address line 3	This is the 3 <sup>rd</sup> line of the mailing address.	Mailing address line 3	30
Editable	Mailing City	This is the city of the mailing address.	Mailing Address city	50
Editable	Mailing State	This is the state of the mailing address. It defaults to N/A	Select state	
Editable	Mailing Zip	This is the zip code of the mailing address.	Mailing Address Zip	
Editable	Mailing Country	This is the country of the mailing address. It defaults to N/A.	Select country	
Editable	Mailing County	This is the county of the mailing address.	Select the County of the address from the drop down box.	
Editable	Mailing Province	This is the province of the mailing address.	Province Name	30
Editable	Mailing E-mail address	This is the e-mail address of the mailing address.	Mailing address e-mail	30
Editable	Mailing address URL.	This is the URL at the mailing address. Universal Resource Locator is also know as web site address.	Web site Name	30
Editable	Mailing address phone number	This is the phone number at the mailing address.	Mailing address phone	10
Editable	Mailing address Fax number	This is the fax number at the mailing address.	Mailing address fax	10
Editable	Same as Mailing address	Checking this box protects all the location address fields and populates the location address fields with the mailing address fields.	Check box to populate location address with mailing address	
Editable	Location Address line 1	This is the 1 <sup>st</sup> line of the location address.	Location address line 1	30

Editable	Location Address line 2	This is the 2 <sup>nd</sup> line of the location address.	Location address line 2	30
Editable	Location Address line 3	This is the 3 <sup>rd</sup> line of the location address.	Location address line 3	30
Editable	Location City	This is the city of the location address.	Location Address city	50
Editable	Location State	This is the state of the location address. It defaults to N/A	Select state	
Editable	Location Zip	This is the zip code of the location address.	Location Address Zip	
Editable	Location Country	This is the country of the location address. It defaults to N/A	Select country	
Editable	Location County	This is the county of the location address.	Select the County of the address from the drop down box.	
Editable	Location Province	This is the province of the location address.	Province Name	30
Editable	Location E-mail address	This is the e mail address of the location address.	Location address e-mail	30
Editable	Location address URL.	This is the URL at the location address. Universal Resource Locator is also know as web site address.	Web site Name	30
Editable	Location address phone number	This is the phone number at the location address.	Location address phone	10
Editable	Location address Fax number	This is the fax number at the location address.	Location address fax	10
Editable	Update	The user checks this to indicate that the address of this account needs to be updated as well.	Update this account?	Displayed as many times as there are accounts in the group.
Display	Tax Type	This is the tax type of the other accounts in the group.		Displayed as many times as there are accounts in the group.
Display	Account Number	This is the account number of the other accounts in the group.		Displayed as many times as there are accounts in the group.
Display	Account Name	This is the name of the account.		Displayed as many times as there are accounts in the group.

Display	Status Code	This is the status of the account.		Displayed as many times as there are accounts in the group.
Display	Address	This is the address of the account. The user can choose to only update the location address or the mailing address or both.		Displayed as many times as there are accounts in the group.

### **Buttons on the screen**

<b>Button Name</b>	<b>Button Functionality</b>
Save	This updates the address.
Cancel	This cancels the changes on the screen
Back	This takes the user to Account Maintenance Screen.

### **ToolBar Options**

There is no Navigation tool bar on this page. The user has to go back to the Account Maintenance Screen.

### **Edits**

<b>Error Condition</b>	<b>Error Message</b>	<b>Error Field</b>	<b>User Action</b>
Mailing Address line 1 is blank	Please enter mailing address	Mailing Address Line 1	User enters Mailing Address line 1
Entry on address line 2 or 3 but address line 1 blank; or Entry on address line 1 and 3 but line 2 is blank; or Entry on address line 3 only.	Please begin address on address line 1	Mailing Address Line 1	User enters Mailing Address line 1
Mailing City is blank.	Please Enter City	Mailing City	User enters City
Country is USA but mailing zip code is blank.	Please Enter Zip	Mailing Zip	User enters the Zip Code
Country is USA but mailing province is not blank.	Province cannot be entered with USA	Mailing Province	User corrects the Country or deletes the Province.
State is KY but county has not been selected.	Please enter county code	County Code	User selects a county code
Location Address line 1 is blank	Please enter Location Address	Location Address Line 1	User enters Location Address line 1

Entry on address line 2 or 3 but address line 1 blank; or Entry on address line 1 and 3 but line 2 is blank; or Entry on address line 3 only.	Please begin address on address line 1	Location Address Line 1	User enters Location Address line 1
Location city is blank.	Please Enter City	Location City	User enters City
Country is USA but location zip code is blank.	Please Enter Zip	Location Zip	User enters the Zip Code
Country is USA but location province is not blank.	Province cannot be entered with USA	Location Province	User corrects the Country or deletes the Province.
State is KY but county has not been selected.	Please enter county code	Location County Code	User selects a county code

## Processing on the screen

This screen lets the user update the address on the account; it also allows the user to apply the update to any other account in that “group”. A “group” is list of accounts which share the same identifiers (CRIS number, FEIN, SSN, or MIXER number). This lets the user update all accounts for an entity at the same time.

The mailing address and the location address of the accounts in the group show up as two different rows in the table. The user can choose to update the location address and/or the mailing address. The system updates the mailing and/or location address of the account in the group with the mailing and/or location address of the account currently being maintained.

After making all necessary changes the user should go back to the Account Maintenance screen and click the save button.

**Screen 10 – Address Maintenance, Mailing Address Portion**

Address Maintenance - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Location Address

Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
City, State, Zip	<input type="text"/> N/A <input type="text"/>
Country	N/A
County Province	001 - Adair
E-mail URL	<input type="text"/>
Phone FAX	<input type="text"/>

Update?	Tax Type	Account Number	Account Name	Status Code	Address
<input type="checkbox"/>	014	000000000059	KENTON CO CLERK	01 - Active	Mailing - PO BOX 1109 COVINGTON 410121109
<input type="checkbox"/>					Location -
<input type="checkbox"/>			KENTON CO	01 -	Mailing -

Start MIF Entry - UINF... http://disfonta3/... Address Maint... Microsoft Word 8:37 AM

Screen 12 – Address Maintenance – Location Address Portion

Address Maintenance - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Country	N/A
County Province	001 - Adair
E-mail URL	<input type="text"/>
Phone FAX	<input type="text"/>

Update?	Tax Type	Account Number	Account Name	Status Code	Address
<input type="checkbox"/>	014	000000000059	KENTON CO CLERK	01 - Active	Mailing - PO BOX 1109 COVINGTON 410121109
<input type="checkbox"/>					Location -
<input type="checkbox"/>	052	000000000059	KENTON CO CLERK	01 - Active	Mailing - PO BOX 1109 COVINGTON 410121109
<input type="checkbox"/>					Location -
<input type="checkbox"/>	068	000000000059	KENTON CO CLERK	01 - Active	Mailing - PO BOX 1109 COVINGTON 410121109
<input type="checkbox"/>					Location -

Save Cancel Back

Start MIF Entry - UINF... http://disfonta3/... Address Maint... Microsoft Word 8:37 AM

Screen 11 – Address Maintenance – Update Related Accounts Portion

# Work List Screen

## Purpose of the screen

The purpose of this screen is to give the users a method for correctly completing the posting of transactions to a specific account or correctly updating demographic information. The user will be given the choice of search type, work list type, search text, and tax type.

There are four search types:

1. Work List Type – Generally, the user would select this search type along with the tax type to work the work list.
2. Account Number – The user can search the transaction name mismatch work list and the missing demographics work list by account number to locate a particular transaction without having to search the entire list.
3. Transaction Name - The user can search the transaction name mismatch work list and the missing account number work list by transaction name to locate a particular transaction without having to search the entire list.
4. Validating Number - The user can search the transaction name mismatch work list and the missing account number work list by validating number to locate a particular transaction without having to search the entire list.

There are three work list types:

1. Missing Account Numbers - The batch MIXER System will dump the transactions with invalid account numbers into a catch all account number (i.e. Account number 999999999) under the correct tax type. The user (after research) will change the transaction to the correct account number without having to do a journal voucher. (A new account number might have to be added prior to doing this.)

The user has the following options:

- Save the item - This is when the user has corrected the work item by providing an active MIXERS account number and clicking the SAVE button.
  - Leave the item on hold - If the user clicks the X at the top right of the pop-up box, this will cause the work item to be put on hold for that user, and no other user can get to it. After the user finds the information, the user can come back to the work list and find the item on his/her Held Items List to enter the account number.
  - Release the item - If release is selected on the pop-up box the work item is put back onto the list and another user working the work list can get to that item.
2. Missing Demographics - When a transaction is posted using an account number which doesn't exist, the system will create a new account with no demographics.  
The user has the following options:
    - Work the item - The system automatically takes the user to the Account Maintenance page where the user can enter demographics for the account. Once the information is entered and the SAVE Button is clicked the item will be removed from the work list. If the transaction is determined to be posted under the wrong account the user should do a journal voucher to correct the posting. If the new account was created in error the account number should be maintained to "Deletion" status. This will remove the item from the work list.
    - Leave the item on hold – If the user clicks the WORK LIST Button, the work item will be put on hold for that user, and no other user can get to it. After the user finds the information, the user can come back to the work list and find the item on his/her Held Items List to enter the demographic information.
    - Release the item - If RELEASE is selected from the bottom of the screen the work item is put back onto the list and another user working the work list can get to that item.
  3. Transaction Name Mismatch – If a transaction is posted to an account in MIXERS with a transaction name different from the account name, the item will be posted to this work list.  
The user has the following options:

- Accept the work item – If the user clicks ACCEPT this will cause the transaction name to be “Accepted”. For example, the account name might be “SHELL COMPANY” and the transaction name might be “SHELL CO”. From that time on, any transactions posted under that account with a transaction name of “SHELL CO” will be considered a match and will not appear on the work list. If the user discovers that a transaction has been placed in the wrong account, the user will be required to do a journal voucher to move the transaction to the correct tax type and account number. The journal voucher will remove the item from the work list.
- Leave the item on hold – If the user clicks the X at the top right of the pop-up box, this will cause the work item to be put on hold for that user, and no other user can get to it. After the user finds the information, the user can come back to the work list and find the item on his/her Held Items List to enter the information.
- Release the item – If release is selected on the pop-up box the work item is put back onto the list and another user working the work list can get to that item.

## To get to the screen

The user can get to this screen by clicking the “Work List” button on the toolbar.

## Data Elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Editable	Search Type	This is a list box that lets the user select what to search by. The values are: <ul style="list-style-type: none"> <li>▪ Worklist Type</li> <li>▪ Account Number</li> <li>▪ Transaction Name</li> <li>▪ Validating Number</li> </ul>		
Editable	Search Text	Input text field containing user entered search criteria. Specific edits will apply for each search type. In case of account number or validating number, the system will prefix 0's.		
Editable	Sort by	This is a list box that lets the user select what to sort the list by. The values are: <ul style="list-style-type: none"> <li>▪ Account Number</li> <li>▪ Period</li> <li>▪ Process Date</li> <li>▪ Transaction Code</li> <li>▪ Validating Number</li> </ul>		
Editable/Display	Tax Type	This is the Tax Type List box that lets the user select the tax type of the account the user wants to search for comments on. It is a display only field in the list. The user can also key in the tax type - for example: 046.		12
Editable	Work List Type	This lets the user select the type of work list the user wants to work. The values are: <ul style="list-style-type: none"> <li>• Missing Account Numbers</li> <li>• Missing Demographics</li> <li>• Transaction Name Mismatch</li> </ul>		

Editable/Display	Account Number	This field is a numeric text box for the Missing Account Numbers Work List. For the Transaction Name Mismatch and Missing Demographics work lists, this field is display only. The system prefixes the entered account number with 0's.		12
Display Only	Account Name	This is the name of the account under which the transaction was posted.		
Display Only	Transaction Name	This is the name on the transaction.		
Display Only	Period	This is the period for which the transaction was posted.		
Display Only	Validating Number	This is the validating number of the transaction.		
Display Only	Process date	This is the date the transaction was processed.		
Display Only	Transaction code	This is the transaction code.		
Display Only	Type return code	This is the type of return.		
Display Only	User Id	This is the user who has the item on hold.		

### **Buttons on the screen**

<b><i>Button Name</i></b>	<b><i>Button Functionality</i></b>
Find Item	This gets a list of work items for the selected tax type and work list type.
Find Held Items	This gets a list of work items for the selected tax type and work list type that the user has on hold.
Save	This button is only displayed for the Missing Account Number and Missing Demographics work lists. This is to save the data entered.
Release	This button releases the work item back to the pool so that another user can access it from the list.
Accept	This button is only displayed for a Transaction Name Mismatch work list item. By clicking this button the user is indicating that the transaction name is acceptable for that account.
Work List	This button is only for the Missing Demographics work list. It takes you back to the list from the maintenance screen, putting the item on hold.

### **ToolBar Options**

Using the Navigation tool bar the user can go to –

- Account Inquiry
- Account Search/Add
- Account Maintenance
- Comments – Add
- Comments – Inquire
- Help
- Logoff

## **Edits**

<b><i>Error Condition</i></b>	<b><i>Error Message</i></b>	<b><i>Error Field</i></b>	<b><i>User Action</i></b>
The user uses a search type of Account Number with the Missing Account Number Work List.	Search type not valid for Missing Account Number Work List	Search Type	User changes search type or work list type and clicks Find Items again.
The user uses a search type of Transaction Name with the Missing Demographics Work List.	Search type not valid for Missing Demographics Work List	Search Type	User changes search type or work list type and clicks Find Items again.
The user uses a search type of Validating Number with the Missing Demographics Work List.	Search type not valid for Missing Demographics Work List	Search Type	User changes search type or work list type and clicks Find Items again.
The user selects a search type of transaction name, account number, or validating number without entering a search text.	Please enter Search Text	Search Text	User enters search text and clicks Find Items again.
The user clicks the SAVE button without entering an account number	Please enter account number	Account Number	User enters an account number and clicks Save again
The user clicks the SAVE button but account number doesn't exist on MIXERS.	Account number does not exist on database	Account Number	User enters an existing account number and clicks Save again. Or adds the account and comes back to the work list

## **Processing on the screen**

This page will allow users to work the work items. The system will automatically generate this work list. The user must first select the search type, work list type, search text, and the tax type or tax type group he/she needs to work with and click the FIND ITEMS button or the FIND HELD ITEMS button. A list of all items with that search criteria appears. The user can select any item from the list that is not on another user's hold list by clicking on the account number. This will bring up a pop-up box for the missing account number work list and the transaction name mismatch work list and will bring the user to the maintenance screen for the missing demographics work list. The list can be sorted by account number, period, process date, transaction code or validating number. If the user does not have all the necessary information at that time, he or she has the ability to leave that transaction on hold until all the necessary information has been collected to finalize the account information.

When an item is selected from the work list by a user, this item is automatically placed on hold for the user by the system. No other user can get to this item.

If the user goes to another screen in MIXERS and then returns to the work list screen, the last page viewed will be displayed.

Work List - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance **Work List** Comments/Add Comments/Inq Help? Logoff

Search Type WorkList Type  
 Work List Type Missing Account Numbers  
 Search Text  
 Tax Type 032 - Insurance Tax  
 Sort By Acct Num

Missing Account Number -- Web Page Dialog ? X

Enter Account Number:   
 Save Release

Find Held Items

Tax Type	Transacti	g Num	Process Date	Period	UserId
032	<a href="#">NORTH AMER CHEMICAL</a>	04 02	000230116	6/12/01	12/31/99
032	<a href="#">HCC LIFE INS CO</a>	01 01	000227881	6/6/01	6/30/01
032	<a href="#">COMPANION PROPERTY &amp;</a>	04 06	000227883	6/6/01	6/30/01
032	<a href="#">COMPANION PROPERTY &amp;</a>	04 06	000227884	6/6/01	6/30/01
032	<a href="#">UNITED FINANCIAL CAS</a>	01 02	000227314	6/1/01	6/30/01
032	<a href="#">TX LIFE INS CO</a>	04 01	000226035	6/1/01	6/30/01
032	<a href="#">PREFERRED PROFESSION</a>	01 02	000226733	6/1/01	6/30/01
032	<a href="#">MANUFACTURERS LIFE I</a>	04 06	000227231	6/1/01	6/30/01
032	<a href="#">ETON LIFE INS CO</a>	04 06	000126865	1/30/01	12/31/00
032	<a href="#">WASHINGTON GROUP INT</a>	01 02	000123801	1/26/01	12/31/00

Page: | 1 | 2 | 3 | 4

**Screen 13 – Missing Account Number Work List Screen**

Work List - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance **Work List** Comments/Add Comments/Inq Help? Logoff

Search Type WorkList Type  
 Work List Type Transaction Name Mismatch  
 Search Text  
 Tax Type 035 - Public Service Company  
 Sort By Acct Num

MisMatchName -- Web Page Dialog ? X

Account Name: AMERICAN EAGLE AIRLINES INC  
 Accept Release

Find Items Find Held Items

Tax Type	Account Number	Process Date	Period	UserId
035	<a href="#">000043180083</a>	6/1/01	12/31/00	
035	<a href="#">000251838409</a>	5/17/01	12/31/00	
035	<a href="#">000363520132</a>	2/20/01	12/31/99	
035	<a href="#">000382036404</a>	6/1/01	12/31/00	REV0876
035	<a href="#">000522074531</a>	10/13/00	12/31/00	
035	<a href="#">000610350770</a>	3/30/01	12/31/00	
035	<a href="#">000610655097</a>	10/3/00	1/31/99	
035	<a href="#">000610655097</a>	1/12/01	12/31/00	
035	<a href="#">000610738945</a>	7/13/01	12/31/99	
035	<a href="#">000611084927</a>	8/16/01	12/31/01	

Page: | 1 | 2 | 3

**Screen 14 – Transaction Name Mismatch Work List**

Work List - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance **Work List** Comments/Add Comments/Inq Help? Logoff

Search Type WorkList Type  
 Work List Type Missing Demographics  
 Search Text  
 Tax Type 035 - Public Service Company  
 Sort By Acct Num Find Items Find Held Items

Tax Type	Account Number	Account Name	User Id
035	<a href="#">000251749971</a>	LOUISVILLE LIGHTWAVE	
035	<a href="#">000350793669</a>	INDIANA GAS COMPANY	
035	<a href="#">000560656680</a>	GTE SOUTH INC KENTUC	
035	<a href="#">000611003582</a>	EVERGREEN SEWAGE DIS	
035	<a href="#">000616000412</a>	MAYFIELD ELECTRIC &	
035	<a href="#">000621533223</a>	TRANSCOMMUNICATIONS	
035	<a href="#">000760520632</a>	EZ TALK COMMUNICATIO	

Page: | 1

**Screen 15 – Missing Demographic Work List**

Account Maintenance - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance **Work List** Comments/Add Comments/Inq Help? Logoff

Tax Type 012 Account Number 000000000764

Name Maintenance Address Maintenance

Account Name	HT HACKNEY CO
CRIS Number	<input type="text"/>
FEIN	<input type="text"/>
SSN	<input type="text"/>
MIX Number	<input type="text"/>
System Assigned MIX Number?	<input type="text"/> <input type="checkbox"/>
Class Code	000-N/A
Status	Active
Status Date	06/13/2000
Filing Frequency	One Time Only - Required to file only one return i.e. Inheritance -1
NAICS Code	<input type="text"/> <span>Find It!</span>
Last Update	REV0876 06/14/2000 11:20:08 AM

Save Release Work List

**Screen 16 – Missing Demographics Work List Account Maintenance Screen**

# Comment Add Screen

## Purpose of the screen

The purpose of this screen is to allow the users to add comments to a particular account. This screen has two modes.

1. Display mode – This is the mode when there is no selected account number to add the comment to. When in this mode there are only two fields shown on the screen, the Tax Type List Box and the Account Number text box. If the user wants to get to the Entry Mode, they have to select a tax type and enter an existing account number and click the “Get” button.
2. Entry Mode – In this mode the user can enter the comment. In this mode the tax type and account number fields are not editable. The account name is also displayed. The user can click the ‘Cancel’ button to go back to the “display mode”.

## To get to the screen

The users can get to this screen by clicking the “Comments/Add” button on the tool bar.

## Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Editable/Display	Tax Type	This field is a list box in “Display Mode” and is a display only field in the “Entry Mode”.	Enter Tax Type or Select a tax type from the list	
Editable/Display	Account Number	This is a numeric field in “Display Mode” and is a display only field in the “Entry Mode”.	Enter an existing account number	12
Display	Account Name	This field is only displayed in “Entry Mode”. This is the name of the account		
Editable	Comment Type	This field is only visible in the “Entry Mode” This is the type of comment the user wants to add. The types are: <ul style="list-style-type: none"> <li>• Demographic</li> <li>• General (Default)</li> <li>• Transactions</li> </ul>	Select a Comment Type from the drop down box	-
Editable	Comment Text	This field is only displayed in “Entry Mode”. This is the text of the comment being added.	Enter Comment Text	250
Display Only	Date	This field is only displayed in “Entry Mode”. This is the date the comment was entered.		Repeated up to 10 times
Display Only	Comment Type	This field is only displayed in “Entry Mode” This is the type of comment.		Repeated up to 10 times
Display Only	User	This field is only displayed in “Entry Mode” This is the name of the user who entered the comment.		Repeated up to 10 times
Display Only	Text	This field is only displayed in “Entry Mode” This is the text of the comment.		Repeated up to 10 times

## Buttons on the screen

<b>Button Name</b>	<b>Button Functionality</b>
GET	This button is shown only in the “Display Mode”. After the user has selected a tax type and entered an account number the user clicks this button to go to the “Entry Mode”.
SAVE	This button is shown only in the “Entry Mode”. After the user has entered a comment, the user clicks the SAVE button to add the comment to the Account.
Cancel	This cancels the add comment process after confirming with the user. When the user clicks this button for the first time the system issues a prompt – “Are you sure you want to cancel the add?” If the user answers in the affirmative the system goes into the “Display Mode”.
Page Navigation Line	The user has the ability to select any of the 10 pages listed. If the number of matches is more than 10 pages the user can select “Previous 10” and “Next 10” buttons to navigate through the list. <b>1-100 matches</b> – Page line shows up with links to Pages 1 through 10, but no Previous 10 and Next 10 buttons show. <b>101 – 500 matches</b> - Page line shows up with links to Pages 1 through 10. The “Previous 10” and “Next 10” buttons show up for user to navigate through all the matches. <b>500 + matches</b> - Error message requiring the user to narrow the search.

### ToolBar Options

Using the Navigation tool bar the user can go to –

- Account Inquiry
- Account Search/Add
- Account Maintenance
- Work List
- Comments – Inquire
- Help
- Logoff

### Edits

<b>Error Condition</b>	<b>Error Message</b>	<b>Error Field</b>	<b>User Action</b>



## Comment Inquiry/Search

This screen lets the user search for comments on the MIXER system.

### How can you get to the screen

The user can get to this screen from various MIXER screens by using the Comments/Inq button on the Navigation Tool Bar.

### Data elements on the screen

<i>Field Type</i>	<i>Field Name</i>	<i>Description</i>	<i>Balloon Help</i>	<i>Length</i>
Editable	Search Type	This is the Comment Search Type List box, which lets the user select the search type. The user can also key in the search type. The following are the various search types: <ul style="list-style-type: none"> <li>Account Number (<b>default</b>).</li> <li>CRIS Number</li> <li>FEIN</li> <li>MIXER Number</li> <li>SSN</li> </ul>	Select a Search type from the drop-down box	-
Editable	Search Text	Input text field containing user entered search criteria. Specific edits will apply for each Search Type. In case of FEIN and SSN all 9 digits will have to be entered without any delimiters like '-'. In case of account number, MIXER number, or CRIS number the system will prefix 0's.	Enter search text	Depends on Search Type
Editable	Tax Type	This is the tax type list box that lets the user select the tax type of the account the user wants to search for comments on. The user can also key in the tax type – (example: key 046 for TT 046). If the user had selected a tax type on a previous screen then that tax type is automatically selected on this screen. The following are the choices: <ol style="list-style-type: none"> <li>Any of the tax types.</li> <li>'—ALL—' This will include all tax types in the search.</li> <li>Any of the filters. These are filters, which let the user select on a particular grouping of tax types. These groups are <ul style="list-style-type: none"> <li>Alcoholic Beverages Taxes Tax Types – 18 through 24</li> <li>Cigarette taxes Tax Types – 12, 16 and 17</li> <li>Insurance Taxes Tax Types – 32, 45 and 47</li> <li>Legal Process Taxes Tax Types – 14 and 68</li> <li>Motor Fuels Taxes Tax Types – 54, 55, 56, 77 and 92</li> <li>Racing Taxes</li> </ul> </li> </ol>	Enter a tax type or select one from the drop down box	12

Tax Types – 28, 29, 30 and 81				
Editable	Comment Type	This lets the user select the types of comment they want to be returned after the Search. The types are: <ul style="list-style-type: none"> <li>• ALL (default)</li> <li>• Demographic</li> <li>• General</li> <li>• Transactions</li> </ul>	Select a comment type from the drop down box	
Editable	Sort By	This lets the user sort the results. The choices are: <ul style="list-style-type: none"> <li>• Chronological order (default)</li> <li>• User Name</li> </ul>	Select a sort from the drop down box	
Display Only	Date	This is the date the comment was entered.		Repeated up to 10 times
Display Only	Comment Type	This is the type of comment.		Repeated up to 10 times
Display Only	User	This is the name of the user who entered the comment.		Repeated up to 10 times
Display Only	Text	This is the text of the comment.		Repeated up to 10 times

### **Buttons on the screen**

<b><i>Button Name</i></b>	<b><i>Button Functionality</i></b>
Search Comments	This is the default button on the screen. After the user has selected the search type and entered the search text, the user clicks this button to invoke the search.
Page Navigation Line	The user has the ability to select any of the 10 pages listed. If the number of matches is more than 10 pages the user can select “Previous 10” and “Next 10” buttons to navigate through the list. <b>1-100 matches</b> – Page line shows up with links to Pages 1 through 10, but no Previous 10 and Next 10 buttons show. <b>101 – 500 matches</b> - Page line shows up with links to Pages 1 through 10. The “Previous 10” and “Next 10” buttons show up for user to navigate through all the matches. <b>500 + matches</b> - Error message requiring the user to narrow the search.

### **ToolBar Options**

Using the Navigation tool bar the user can go to –

- Account Inquiry
- Account Search/Add
- Account Maintenance
- Work List
- Comments – Add
- Help
- Logoff

## Edits

<i>Error Condition</i>	<i>Error Message</i>	<i>Error Field</i>	<i>User Action</i>
The user clicks the SEARCH button without entering a search text	Please enter a search text	Search Text	Enters a valid search text for the selected Search Type and clicks SEARCH again
The user selects the FEIN search but does not enter 9 digits.	Please enter the 9 digit FEIN	Search Text	Enters the 9 digit FEIN and clicks SEARCH again
The user selects the SSN search but does not enter 9 digits.	Please enter the 9 digit SSN	Search Text	Enters the 9 digit SSN and clicks SEARCH again
The user selects the CRIS number search but does not enter 6 digits.	Please enter the 6 digit CRIS number	Search Text	Enters the 6 digit CRIS Number and clicks SEARCH again
Search exceeds 50 pages	Search result exceeds 50 pages, please modify search criteria	Search Text	Modify the Search criteria and click Search again
No account comments meet the search criteria	Search criteria not found	Search Text	

## Processing on the screen

This screen is used to do searches for comments on the MIXERS database. The following are the various search types:

- Account Number (**default**). The number entered is prefixed with 0's by the system.
- CRIS Number
- FEIN
- MIXER Number
- SSN

If the search results of a particular search criteria are being displayed on the screen and the user changes search criteria, then the "results" section of the screen is blanked out. This is done because the details on the screen are no longer valid for the new search criteria.

**Search Comments - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Inquiry Search/Add Maintenance Work List Comments/Add **Comments/Inq** Help? Logoff

Search Type: Account Number  
 Search Text: 000000000059  
 Tax Type: 014 - Legal Process - County Clerk  
 Comment Type: ALL  
 Sort By: Chronological order

Search Comments

Date	Comment type	User	Text
05/30/2000	Demographics	BROWN LARRY M	demographic maintenance to correct account name in correctly listed as kenton county clerk k k

Page: | 1

Start MIF Entry - UINFO.XNF http://disfonta3/mixer/... Search Comments -... Microsoft Word 8:27 AM

**Screen 18 – Comment Inquiry/Search Screen**